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ABSTRACT: A conceptual model is presented that depicts the relationship between service provider performance measures, customer evaluation of the service encounter, and degrees of customer satisfaction. The model is tested using a multistage survey of a random sample of 100 service providers and salespeople. One of the important findings is the lack of a negative relationship between sales performance, a customer's evaluation of the service experience, and customer satisfaction. In addition, management's overall performance evaluation of service or sales personnel is found to emphasize different aspects of the service transaction

experience than those used by the customer in deriving satisfaction with the service firm.

TEXT: INTRODUCTION

In response to a dynamic, competitive environment that includes deregulation, product diversification and service automation, a marketing evolution is emerging in the management of the services sector. As competition increases and customer demands escalate, service providers are becoming more sophisticated in obtaining and maintaining accounts. To this end, an increasing number of service institutions are integrating a sales orientation into service provision systems.

To increase sales behavior, reward inducements are being implemented in many service environments. In retailing, a number of department stores and retail clothing outlets are attempting to emulate the much heralded success of <u>Nordstrom</u> department stores and are instituting commission-based reward structures as motivation for customer contact personnel to engage in selling behaviors (Bergmann 1990). This trend is particularly prevalent in services retailing (Berry 1986), where personal selling is considered even more important due to the intangible nature of the product (Lusch and Dunne 1990; p. 542). Several of the nations leading financial institutions have instituted variable compensation systems to motivate their contact personnel (Ayars 1988). The desired result of these performance motivation systems is the sale of related products (cross-selling) to customers, which allows firms to pursue product strategies diversifying from core services into complementary products. For instance, in the travel and tourism business, the booking of airline reservations is almost always followed up with cross-selling requests from the service provider targeted at related customer needs such as ground transportation or lodging.

As these examples illustrate, there is a growing number of service providers that are now being rewarded for increased sales performance. Given the growth in the American service sector and the magnitude of retail trade alone, there is a substantial opportunity for integrating and/or escalating sales activity in the roles performed by customer contact personnel. Furthermore, suggestions about additional purchase opportunities to customers with whom a firm already has contact are an efficient use of marketing expenditures that can result in improvements to overall profitability (Ayars 1988).

While the use of service providers in selling roles appears to offer many distinct opportunities for improving market performance, it is interesting to note that a large number of firms have not embraced the integration of sales programs. Part of the reluctance to employ sales strategies facilitated through incentive-based compensation systems is the concern that service providers will focus too heavily on generating sales which will result in behaviors that create dissatisfied customers (Lusch and Dunne 1990, p. 631; Minken 1987). Perceived threats of reduced managerial control and high pressure sales tactics, which are often associated with commission retail sales, can be viewed as undermining the objectives of the service delivery system and contributing to high levels of customer turnover as well as negative word-of-mouth (Berman and Evans 1989; Stanton and Buskirk 1987). Revising the reward system to incorporate sales incentives requires a careful examination of the necessary monitoring and control mechanisms (Anderson and Oliver 1987; Stanton and Buskirk 1987). For service institutions to effectively enact compensation systems designed to encourage sales behaviors, management must focus its attention on directing contact personnel to attend to their dual role of service provider and salesperson. Effective sales motivation without competent service performance can be more detrimental than beneficial.

The purpose of this paper is to assess the relative influence of service personnel sales behaviors on customer evaluations of service/sales experiences and the degree to which these customer experiences contribute to customer satisfaction. Further, the managerial assessment of service provider/salesperson performance is assessed and related to customer

perceptions of service transactions. To explore these relationships, a study of variably compensated (sales and service performance-based) service providers and their retail customers was conducted in a banking context. A conceptual model depicting the relationship between service provider performance measures, customer evaluation of the service encounter and degrees of customer satisfaction is advanced and tested.

THE HYPOTHESIZED MODEL

INDEPENDENT VARIABLES:

With the strategic shift in the services sector from predominantly operations directed service provision systems toward the incorporation of more marketing and/or sales-oriented philosophies, there is a need to re-examine how service provision processes are managed and to assess the impact of these processes on customer satisfaction (Cocheu 1988). The proposed model in Figure 1 is premised on the marketing literature and depicts relationships among select performance measures of service provider/salespersons activity with management's performance ratings (Y3) of these service providers and customers' evaluation of service encounters (Y4). (Figure 1 omitted) The model also depicts the relationships of these performance measures and evaluation processes with customer satisfaction at both the service institution level (Y1) and the service provider level (Y2).

As firms explore methods of enhancing the sales performance of service providers, concern has been expressed about the effect of sales behaviors on the customer evaluation of a service experience. An effective control system for monitoring, directing, evaluating and compensating service employees should focus on behaviors that deliver customer satisfaction while achieving the firm's sales objectives (Gauthier 1990; McCune 1989; Cocheu 1988; Cron and Levy 1987). The attainment of sales objectives, such as the sale of promotional products (X1) and increased cross-selling activity to new and existing (X3) customers, is quantified and often facilitated through the use of sales contests and variable compensation methods such as bonuses and commissions (Roskopf 1987; Sanfilippo 1987).

In addition to sales measures, operational dimensions are commonly quantified in a service performance evaluation. Perhaps the most common operations measure of performance is the number of customer transactions (X4), often referred to as contact rate (Lusch and Dunne 1990, p. 554). When contact rate is quantified, it is often used as an indicator of operational efficiency. However, Anderson and Oliver (1987) caution that in developing an evaluation system, it is optimal to seek a balance of the quantitative and the qualitative inputs, particularly in a service context where customer relationships are long-term (Avila, Fern and Mann 1988; Crosby and Stephens 1987). Many of these qualitative performance dimensions (e,g., follow- up, responsiveness) are best obtained from surveying the customer him/herself and should serve as an integral part of service provider/salesperson performance rating.

The performance measures that are incorporated into the proposed model are depicted as exogenous variables and may be found on the left-hand side of Figure 1. As depicted in this hypothesized model, these performance variables are interrelated. Part of this interrelationship is due to tradeoffs that are likely to occur when introducing sales behaviors into service provision systems. The first three service provider/salesperson performance measures are indicative of sales ability and hypothetically should be positively associated with one another. However, transaction performance is thought to detract from cross-selling efforts, as salespeople often have insufficient time to explore sales opportunities with customers as the number of transactions (X4) increases. Thus, a negative relationship would be hypothesized between the transactional rate (X4) and cross sell ratios (X2) and (X3).

DEPENDENT VARIABLES:

The performance measures (independent variables) previously discussed, provide supervisors with quantitative indicators that contribute to an overall evaluation of a service provider (Lusch and Dunne 1990, p. 624). Successful sales performance measures should reflect the actual selling job (Schuster and Zingheim 1986) rather than sales volume alone. Appraisals of customer service performance should focus on issues that positively impact the customer service experience (McCune 1989; Cocheu 1988; Gelb 1985). Thus, sales behaviors should be related to managerial performance ratings (Y3). Furthermore, sales behaviors, regardless of whether they enhance a service encounter or fall short of customer expectations, have some effect on the customer's assessment of the service experience (Y4) whether it be favorable or unfavorable.

The individual performance rating is a tool supervisors use to control and direct the efforts of service providers/salespersons (Hartley 1989). This is particularly meaningful in settings where salary represents a substantial portion of compensation (Stanton and Buskirk 1987). To establish service provider/salesperson performance expectations, marketing oriented service management should focus on behaviors that are important in cultivating customer satisfaction (Cocheu 1988; Habak and Rohde 1987; Gelb 1985) as well as achieving sales based marketing objectives. A key to successfully incorporating the selling function into service delivery systems is identifying and integrating the customer's perception of the service experience in both the training and evaluating of contact personnel (Schuster and Zingheim 1986). Thus, the theoretical model proposes that managerial performance ratings (Y3) are positively related to customer evaluations of a service encounters (Y4) and have a direct positive association to the customers' satisfaction with the institution (Y1) in general and with the service provider/salesperson (Y2) specifically.

Since satisfied customers are the desired outcome of service exchanges, it is paramount to examine what the customer is evaluating during the service encounter (Band 1989; Gelb 1985). Research in services literature has focused on quality as being an important element in the successful marketing of services (Brandt 1988; Goodman et al., 1988; LeBlanc and Nguyen 1988; Albrecht and Crego 1987; Levine 1987; Wagner 1987). One of the more generalized attempts at measuring quality is the SERVQUAL scale developed by Parasuraman, Zeithaml and Berry (1988), which incorporates consumer perceptions of service quality along five dimensions: assurance, empathy, reliability, responsiveness, and tangibility. While there has been some concern about the generalizability of these five dimensions across service environments (Carman 1990), one of the service contexts used to validate the SERVQUAL scale was retail banking (the context of this study) (Parasuraman, Zeithaml and Berry 1988). Of particular interest with regard to the study reported in this paper is the utilization of the five dimensions of service quality to evaluate the customer experience with a single service encounter.

Complying with the recommendations for operationalization of this scale (Carman 1990; Parasuraman, Zeithaml and Berry 1988), 19 items from SERVQUAL which dealt with the customer perception of the service experience were modified for the specific service context under investigation. In the proposed model, an aggregation of the customer's perceptions along these five dimensions is used to represent the customer evaluation of the service encounter (Y4). Recognizing that customer's cumulative experiences with any service provision system often exceeds that of a single encounter, overall satisfaction with both the service institution (Y1) and provider (Y2) were measured and identified to be a function of, but not solely determined by, these specific transaction experiences.

METHODOLOGY

The study employed a multi-stage survey methodology designed to assess critical features of the service encounter believed to be consistent with relevant sales and services marketing literature (Parasuraman, Zeithaml and Berry 1985, 1988; Band 1989; Goldman et al. 1988; LeBlanc and Nguyen 1988;

Crosby and Stephens 1987; Schneider and Bowen 1985; Schneider et al. 1980).
The emphasis of the model is on the service encounter which has been
identified as the most important aspect of the service function (Bitner,
Booms, and Tetreault 1990; Gelb 1985). Each encounter needs to be carefully
managed as individual service experiences, particularly those of a negative
nature, as they can potentially overturn a history of satisfactory
transactions (Bitner, Booms, and Tetreault 1990; Mill 1986). Emphasizing
the critical role of each service transaction, Normann (1983) refers to
these encounters between service providers and customers as "moments of
truth."

The methodology was designed to assess service performance characteristics
of service providers/salespeople and the effect of these characteristics
upon customer perceptions of the service experience and overall
satisfaction. As suggested by previous studies for diagnosing and
evaluating service organizations, data were collected from both sides
of the service exchange (Schneider and Bowen 1985 Schneider et al. 1980).
The dyadic methodology incorporated both service provider/salesperson
performance vanables as well as customer attitudinal items, and matched
bank clients with their specific service provider/salesperson.

Participants in this study were service provider/salespeople referred to as
personal bankers employed by a major southwestern bank, and their
customers. The personal bankers were both responsible for service provision
(e.g., completion of loan application forms and opening savings or checking
accounts) and the selling of complementary bank services to the customer.
Service providers/salespeople were rewarded through a compensation system
which consisted of both fixed (salary) and variable components. The
variable portion was designed such that employees could increase their
income by as much as 20% through performing a variety of sales tasks such
as cross-selling and the sale of promotional items.

DATA COLLECTION

One of the critical outcome variables in the proposed model is the
customer's perception of the service delivered by the service
provider/salesperson (Y4). Thus, a customer questionnaire with the
aforementioned modified items from the SERVQUAL scale was used to measure
perceptions of a recent exchange episode with a specified service
provider/salesperson in the bank. While it was recognized that an isolated
exchange episode may not be the most desirable representation of service
provider/salesperson performance, an aggregate of multiple exchange
episodes for each service provider/salesperson should be a reliable
indicator of the relative level of service delivered by the service
provider/salesperson (Y4).
The questionnaire examined customer perceptions through a series of
(5) variables
statements pertaining to the five key service dimensions: assurance,
empathy, reliability, responsiveness, and tangibility (Parasuraman,
Zeithaml and Berry 1988). In addition, global measures of satisfaction with
the bank in general (Y1) and more specifically with the contact personnel
(Y2) were obtained. The questions used to measure the customer's evaluation
of the service encounter contained multiple measures for each of the five
dimensions advanced by Parasuraman, Zeithaml, and Berry (1988). Reliability
statistics (Cronbach alpha coefficient) for the different dimensions as
well as the dimensions in combination as indicators of the customer'
evaluation of the service encounter were found to be acceptable (see Table
1) (Nunnally 1978). (Table 1 omitted)

Service provider/salesperson data for this study were obtained from
personnel records and monthly performance statistics (averaged across three
months). The data obtained included the manager's sales performance ratings
(Y3) for each service provider/salesperson and sales performance measures
(cross-sell ratios (X and X3) and incentive dollars earned (X1)) for the
quarter during which the customer data were collected. An operational
measure of transactional efficiency (X4) was also acquired; this was a
count of the number of customers served by each service

provider/salesperson during the data collection period.
SAMPLE

A stratified random sample of 100 service providers /salespeople was
identified for participation in this study. This sample size provided the
opportunity for proportional representation across various pre-identified
characteristics believed to be important in determining service
provider/salesperson performance (Churchill, Ford and Walker 1985; Dubinsky
and Skinner 1984; Futrell and Parasuraman 1984; Walker, Churchill and Ford
1977). The variables used for stratification purposes were measured in a
pre- survey of the entire population of service providers/salespeople in
the participating bank. The following criteria were used for qualifying
service providers/salespersons for inclusion in the sample:

* To moderate the effect of experience (Futrell and Parasuraman 1984), the
sample reflected a proportional representation of service
providers/salespeople across the three institution established levels of
experience.

* To minimize possible job related biases in the results (Dubinsky and
Skinner 1984; Futrell and Parasuraman 1984; Walker, Churchill and Ford
1977), a relatively equal proportion (50-50) of service
providers/salespeople extremely satisfied with their jobs versus those less
satisfied was selected.

* To balance the effect of prior sales performance, a relatively equal
proportion (50-50) of those self-reporting to be performing in the top 50%
of all service provider/salespeople versus those in the bottom 50% in
overall sales volume was included in the sample.

Of the 100 service providers/salespeople identified in the sample, complete
information was obtained from a total of 84, representing an effective
response rate of 91% (84/92) as only 92 of the original sample of 100 were
either still with the bank or in their same job title at the end of the
three month data collection period. As there was no requirement that these
individuals participate in this study, a response rate of this magnitude is
quite encouraging, particularly due to the sensitive nature of some of the
material.

The procedure for identifying and surveying the bank customers who
participated in the customer phase of the study was performed in three
stages. In order to assess the customer's perceptions of the service
relationship, it was necessary to select customers for participation in the
study who 1) had transacted with one of the original 100 service
providers/salespeople in the study, and 2) had transacted with this
salesperson within a 1 to 2 week time frame of being surveyed to increase
the likelihood of accuracy in recalling the service experience. Thus, the
first phase of the customer sampling procedure consisted of requesting
service providers/salespeople to provide customer phone numbers for all
sales transactions.

In phase two of the sampling procedure, up to 20 customers of each service
provider/salesperson were contacted and asked to participate in the study.
Out of a potential 2,000 customers who could have been included in such a
sampling scheme, 1,605 were successfully contacted through the
identification process. Of these customers, 1,513, or 94%, agreed to
participate in the study. Phase three of the customer sampling procedure
consisted of sending the customers who indicated a willingness to
participate a survey with a cover letter, a postage paid return envelope,
and $1.00 incentive. All customer surveys were pre-coded serving to link
customers with the service provider/salesperson who served them. This also
made it possible to send a follow-up mailing to all non-respondents. Thus,
all consumer participants were contacted as many as three times in the
sampling process: pre-survey telephone contact to all potential
respondents, mail survey to all who agreed to participate in the study, and
a follow-up mailing to all non-respondents.

As previously mentioned, attrition, promotions, and employee leaves during the data collection penod resulted in participation by 84 service provider/salespersons in all phases of this project. Of the questionnaires that were mailed, 1,318 were to customers of the 84 service provider/salespersons in the final sample, and 1,003 were returned in a usable form for an effective response rate of 76%. Recall the purpose of the study was to assess the effect of sales behavior on customer perceptions of service delivery. For a customer to be included in this study a service provider/salesperson would have reported them as a cross sale and provide this customer's phone number for pre-survey contact purposes. Thus, the criteria for customer inclusion in the study, the logislics of pre-contacting customers and the attrition of service provider/salespeople from the study contributed to the differential between the number of people actually contacted and the initial sample design. A maximum of twenty customers for each salesperson could be contacted for participation in the study; of those salespeople in the final sample, an average of 12 customers per salesperson returned completed questionnaires.

RESULTS

The data obtained through the previously described procedure provided a means of testing the conceptual model depicted in Figure 1. LISREL VII software was a used to assess the tenability of the hypothesized structural model. The basics of path analysis were incorporated into the original design of LISREL (Long 1987), and while this application is just a portion of the program capabilities, researchers can use LISREL constructively, even if they do not wish to use all of the program's many statistical features (Hennessy 1985).

Path analysis using LISREL has several advantages over model fitting with multiple regressions. The use of standardized regression coefficient results from multiple regression makes the comparison of causal models difficult. In LISREL, the analysis of the covanance matrix is used to simultaneously compute unstandardized estimates that facilitate an assessment of the overall goodness of fit for a model and provide a basis for comparing the fit of different models (Hennessy 1985). LISREL analysis evaluates the significance of the paths and indicates alternative structures that could empirically improve the fit among the variables in the hypothesized model.

The criteria for assessing appropriate sample sizes when using LISREL is varied. While some authors call to question applications of LISREL with samples of less than 100 (Hoelter 1985), alternative guidelines seek to strike a balance between sample size and parameter estimation. Other LISREL guidelines suggest that sample sizes should be greater than 50 plus the number of parameters to be estimated (in this model there are 14 parameters to be estimated) and that the size of the sample should meet a ratio criterion of 5 observations for each free parameter (using this criterion the sample should be 70 or 5 X 14) (Lawley and Maxwell 1971). Following either parameter derived sample estimation procedure above would suggest a sample size of 84 to be more than adequate to test the proposed model. In part, the primary rationale for the concern over sample size when using LISREL is due to the effects of the sample on the chi square fit statistic; however, the overall fit statistic provided by LISREL has been reported to be reliable for simple models over a large range of sample sizes (Bearden, Sharma, and Teel 1982). Thus, the sample size and the nature of the model investigated appeared appropriate for the manner in which LISREL was used in this study.

A path analysis of the hypothesized model yielded a chi square test statistic of 11.60 with 9 degrees of freedom for a p value .24 and a goodness of fit index of .96. While the model test indicates a tenable model for the data, it should only be regarded as an approximation of reality (Bollen 1989). There may be other models that fit the data as well or better. While no additional paths, beyond those hypothesized, were found to be statistically significant, significance tests (t statistics) for the

path coefficients in the theoretical model revealed that fit improvement could result from a more parsimonious representation of the proposed relationships. Following Duncan's (1975) method of model fitting or theory trimming (Hennessy 1985), only paths with significant beta coefficients (.10) were retained and the model was re-estimated.

The result of subsequent path analysis indicates that reducing the model provides a more tenable representation of the structural relationship among the variables investigated in this study. While maintaining a strong goodness of fit index level of .96, the more parsimonious model has a chi square value of 15.73 with 17 degrees of freedom and an improved p value = .56. The chi square to degrees of freedom ratio more closely approximates the ratio of 1.0 advanced by Joreskog and Sorbom (1986) as desirable when assessing model tenability. A representation of the structural relationships between these variables including the path coefficients derived through path analysis appears in Figure 2. (Figure 2 omitted)

DISCUSSION

In discussing the results of this study, it is important to note normal cautions about the interpretation of causal models. Additionally, the single firm limitation of this study should be recognized. While there are parallels between these findings and a variety of related studies in the sales and services literatures (e.g., LeBlanc and Nguyen 1988; Parasuraman, Zeithaml, and Berry 1985), due to the exploratory nature of this study, replication is recommended to establish the validity and generalizability of these results. In as much as the proposed constructs and their structural configuration have considerable support in both the sales and services literature and the limitations of the sample not withstanding, the results of this study should have direct relevance to sales-oriented financial service firms. Further, it is likely that these findings are particularly applicable in services retailing, travel and other industries where consumer contact personnel are expected to perform in both service provision and salesperson roles.

The focus of the proposed model in this study was to assess the effect of service provider/salesperson management performance characteristics on customer service experience and satisfaction by examining the relationship of cross-selling, promotional item sales behaviors, and transaction efficiency to the managerial evaluation of service provider/salesperson performance, customer evaluation of the service experience and overall satisfaction. The hypothesized relationships in Figure 1 necessitated some modification to arrive at a more tenable (parsimonious) model (see Figure 2) representing the constructs advanced in this study.
A major difference in contrasting the two models depicted in Figures 1 and 2 is the absence of the hypothesized relationships from the performance measures to both the managerial performance ratings of contact personnel and customer evaluations of the service experience. The relationship among the performance characteristics tested in this model were found to be as hypothesized. That is, the sales performance measures pertaining to cross-selling and promotional item sales were positively related. Further, an inverse relationship between transaction rate and cross-selling was found to be present. Additionally, these service provider/salesperson performance characteristics exhibited no direct relationship with the customer satisfaction measures. It is interesting to note though that only one of the input measures (sale of promotional items) was found to have a significant relationship to overall supervisory performance ratings. No support was found for the viability of a causal relationship between any of the sales performance indicators and the customer's evaluation of the service encounter. Further, it is noteworthy that neither cross-selling behavior (new or present) nor operational efficiency (number of customer transactions) had a direct effect on either managerial performance ratings or on customer assessment of the service experience. The relationship between promotional item sales activity and managerial performance ratings could suggest that management equates sales performance to contest performance, overlooking the critical role of cross-selling as both a sales

and service marketing strategy.

The supervisor's performance evaluation of the service provider/salesperson did exhibit both a direct and indirect relationship to customer satisfaction. Modest, yet significant, positive path coefficients were identified between the performance rating and the outcome variables of customer satisfaction with the bank (.13) and with the customer evaluation of the service experience (.17). Furthermore, strong relationships between the customer evaluation of the service encounter and customer satisfaction with the institution (.61) and service provider (.70) were also found. However, the results of this study indicate that managers' performance ratings emphasized behaviors that enhanced the image of the bank (e.g., zero ques, physical appearance, etc.,) over those which enhanced customer satisfaction with the service provider/salesperson (e.g., problem solving skills, product knowledge, transaction efficiency, etc).

While there is a significant path coefficient between the managerial performance ratings and the customer evaluation of the service experience, the magnitude of this coefficient (.17) suggests caution in the interpretation. The lack of a strong relationship between the performance evaluation of these service providers/salespersons and customer perceptions of the service transaction experience indicates concern over the strategic focus of the performance evaluation system. To better understand the basis of the relatively weak relationship between the manager's performance rating and the customer's evaluation of the service transaction experience, the dimensions of the customer's evaluation construct were explored further. The five dimensions of the customer evaluation (assurance, empathy, reliability, responsiveness, and tangibility) were correlated with the managerial performance rating and with the levels of customer sat isfaction. The magnitude of these correlations appears in Table 2. (Table 2 omitted)

An examination of the order of the correlations in Table 2 indicates that managers and customers have very different priority structures in the evaluation of the service experience. The managerial performance rating exhibits higher correlation with the "tangibles" dimension of the service experience. However, this finding is the exact opposite when assessing the relative strength of the correlation of tangibles with customer satisfaction. The order of the correlation results exhibits a similar pattern between the customer satisfaction levels and the customer evaluation dimensions. "Assurance" and "responsiveness" exhibit the largest correlations with customer satisfaction, yet the manager's evaluation of service provider/salesperson performance, gauged by the strength of the correlation with the service encounter characteristics, revealed these dimensions to be of lower priority. Spearman rank correlation analysis of the contrasts in the ranking of the correlations between customer satisfaction and managers' performance ratings with the customer evaluation dimensions of the service expence was found to be statistically significant (p .01). Thus, it appears that management's evaluation of service provider/salesperson performance fails to emphasize the dimensions of service encounter which are important in formulating the customer's satisfaction with the bank.

CONCLUSIONS AND IMPLICATIONS

In conclusion, as service provision systems begin to integrate sales responsibilities into the roles of service provision personnel, sales behavior does not appear to have a negative direct effect on the customer's evaluation of the service experience. It is interesting to note, however, that the only sales behavior found to directly affect managerial assessment of overall service provider/salesperson performance was incentive item sales (sales contest performance).

A number of observations might be advanced from this portion of the findings. First, the lack of a negative relationship between sales performance, customer's evaluation of the service experience and customer

satisfaction, even given the moderate to strong financial incentive system, questions the ipso facto mentality of many critics about introducing sales into service provision systems. Second, the lack of a positive relationship between sales performance measures of service providers/salespersons and the customer's evaluation of the service experience or customer satisfaction suggests limitations in the integration of the sales function into the role of the service provider. This is particularly troublesome since cross-selling should result in a better job of customer need assessment and contribute to higher levels of satisfaction. Third, the limited use of sales performance measures (emphasis on promotional item sales) in formulating the manager's view of overall service provider/salesperson performance suggests a failure on the part of management to appreciate the positive longterm implications of the cross-sell measures and a propensity to focus on the more visible and often more transaction specific (short-term), promotional item sales behavior.

Finally, evidence from this study supports and extends the work of Parasuraman, Zeithaml, and Berry (1985) which has sought to demonstrate the presence of a gap between management's perception of the service experience and the customer's perception of the service experience. This study indicates a misconception or gap in management's perception of what is important in the customer's evaluation of a service experience. Management's overall assessment of service provider/salesperson performance was weakly correlated with customer perceptions of the service experience and the levels of customer satisfaction. Further, management's evaluation of the service provider/salesperson was not a function of those service provision characteristics deemed important by the customer in determining his/her satisfaction. This could be due, in part, to the ease by which the different dimensions can be evaluated. Service managers are likely to place a greater emphasis on more readily observable, tangible cues (e.g., clean desk, physical appearance) associated with the service provided (Parasuraman, Zeithaml and Berry 1985). Customers, on the other-hand, may be more prone to find encounters with service providers/salespeople more satisfying when relational dimensions of service quality such as responsiveness, reliability, and assurance are emphasized (Crosby, Evans, and Cowles 1990). This finding suggests the need for management to get closer to the delivery process through various forms of customer input in the event that performance evaluation of service providers/salespeople is to reflect proper integration of client perceptions of services quality.

A number of managerial and research implications may be advanced from the results of this study. To implement a sales-oriented service provider/salesperson reward structure that effectively improves sales performance while maintaining or improving customer satisfaction, service managers need a more active supervisory role at the point of customer contact. Motivating the proper service/sales oriented behavior requires the integration of the customer's perspective of the service encounter (e.g. surveys and focus groups).

To effectively integrate the customer's perspective of service delivery into management of service providers/salespeople requires an investment in training. Service institutions need to emphasize the customer's viewpoint into the training of line employees and supervisors. This is particularly important with increased sales management responsibilities. If service management is the key to future success in service firms, evaluation and the training of supervisors and employees should reflect a customer perspective.

More research is needed to better understand how to effectively operationalize an evaluation system for service providers/salespeople. Methodologies incorporating dyadic data collection (Schneider and Bowen 1985; Schneider et al. 1980) should be useful in examining ways to close the gap (Parasuraman, Zeithaml, and Berry 1985) between customer and manager assessment of the relevant characteristics of the service transaction experience. Further, research attention should be directed toward assessing the relationship between sales performance and other

aspects of the gervice provider's role such as interfacing with support staff and other nonboundary spanning personnel.

Though more research is needed to refine the evaluation system, evidence advanced in this study suggests that a sales-oriented service delivery system can be a successful strategic move in the services sector. The emphasis on sales expectations does not appear to have either a positive or negative effect on customer satisfaction. Certainly different mixes of fixed and variable compensation require further investigation, but the key result in this study is that the mere presence of sales behavior among service providers did not yield negative customer experiences. Sales advocates may have been somewhat disheartened that sales oriented behavior did not result in higher levels of customer satisfaction. This may not have been a limitation of sales behavior so much as a function of the relative degree of problem solving skills and authority (empowerment) vested in the service provider/salesperson.

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Kenneth R. Evans is professor and chairperson of the marketing department at the University of Missouri-Columbia. His primary research interests are in the areas of sales, sales management, and marketing management. Dr. Evans' work has appeared in a variety of publications such as the Journal of Marketing, Journal of Advertising, Journal of Personal Selling and Sales Management, Industrial Marketing Management, and a number of conference proceedings. In addition to his research interests, Dr. Evans has worked in a consulting capacity addressing sales and sales management issues in the insurance and banking industries.

John A. Grant is an assistant professor of marketing at Southern Illinois University-Carbondale. His major teaching and research interests are in the field of sales management and services marketing. He has been active in several professional associations and presented papers before the American

?ds

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Set     Items    Description
S1     2246104   SURVEY?? OR ((CONSUMER OR CUSTOMER) (5N) FEEDBACK??)
S2     1551229   IDENTIFIER OR IDENTIFICATION OR IDENTIFYING OR ID
S3       18279   S1 (S) S2
S4       57553   EVALUAT? (5N) DATA
S5       41535   (IDENTIF?) (5N) (PROVIDER?? OR PRODUCER?? OR STORE?? OR RE-
                 STAURANT??)
S6           1   S1 (S) S2 (S) S5 (S) S4
S7        1020   S1 (S) S5
S8          22   S7 AND S4
S9          18   RD (unique items)
S10         15   S9 NOT PY>2001
S11       8543   (IDENTIFIER OR IDENTIFICATION OR IDENTIFYING OR CODED OR P-
                 RE-CODED OR CODE??) (5N) (PROVIDER OR (SERVICE (2W) PROVIDER)
                 OR SALEPERSON)
S12         44   S1 (S) S11
S13         35   RD (unique items)
S14         25   S13 NOT PY>2001
S15          1   S4 AND S14
```
?t s14/6,k/1-25

14/6,K/1   (Item 1 from file: 15)

02609845 25852403
Getting at the management of care within managed care
Feb 1998

...ABSTRACT: by provider organizations are an essential starting point. Researchers also need to develop and test **survey** instruments and protocols to capture these dimensions on a larger scale in order to facilitate empirical analysis. **Identifying** patients to which **provider** care management techniques are applied is likely to be more tractable than trying to identify...

14/6,K/2   (Item 2 from file: 15)

02524389 116351285
                    USE FORMAT 9 FOR FULL TEXT
Buyer observations of the US third-party logistics market
1996
WORD COUNT: 3016

...TEXT: provide guidance in case-study design and to assist in question-wording for the mail **survey** . A wide variety of issues was raised during the focus group discussions. These included definitions, the **identification** of **provider** types, important supplier attributes, the third-party logistics buying process and the future outlook for...

14/6,K/3   (Item 3 from file: 15)

02057292 58561584
                    USE FORMAT 9 FOR FULL TEXT
Managed care in flux: Strategies for the current state
Sep 2000   LENGTH: 5 Pages
WORD COUNT: 2899

...TEXT: to financial guarantees. Typically, these address plan

implementation issues such as the timely delivery of **identification** cards or **provider** directories, client service standards such as telephone answering speed, claims turnaround and member satisfaction **survey** results, and other administrative matters like the timely, accurate delivery of reports. Performance agreements also...

14/6,K/4   (Item 4 from file: 15)
DIALOG(R)File 15:(c) 2003 ProQuest Info&Learning. All rts. reserv.

01665371 03-16361
                    USE FORMAT 9 FOR FULL TEXT
Medicaid managed care policies affecting children with disabilities: 1995 and 1996
Summer 1997   LENGTH: 14 Pages
WORD COUNT: 6897

...TEXT: 1995 and again, approximately 18 months later, during the late fall of 1996.

The telephone **surveys** were supplemented by reviews of State contracts for fully capitated plans that were in effect at the time of our **survey** . We examined those sections of the contract related to enrollment, service responsibilities, EPSDT, medical necessity...

... definitions of terms. In cases where the contracts referenced other relevant documents, such as a **provider** manual or the administrative **code** , we obtained copies of these documents and incorporated them in our analysis.

We analyzed the...

14/6,K/5   (Item 5 from file: 15)
DIALOG(R)File 15:(c) 2003 ProQuest Info&Learning. All rts. reserv.

01540138 01-91126
                    USE FORMAT 9 FOR FULL TEXT
A managerial framework for the acquisition of third-party logistics services
1997   LENGTH: 27 Pages
WORD COUNT: 9147

...TEXT: was sponsored by a major provider of third-party logistics services.6

Following an extensive **survey** of the literature, a summary of which is presented below, a focus group was conducted...

... a broad base of industries, this group addressed issues such as third-party logistics definitions, **identification** of **provider** types, important supplier attributes, customer buying processes, and the future for logistics outsourcing. The meeting...

14/6,K/6   (Item 6 from file: 15)
DIALOG(R)File 15:(c) 2003 ProQuest Info&Learning. All rts. reserv.

01119272 97-68666
                    USE FORMAT 9 FOR FULL TEXT
Merger mania, alliances and subacute care
Nov 1995   LENGTH: 3 Pages
WORD COUNT: 2153

...TEXT: income levels, occupation, employer, etc.), referral source and service utilization. Referral source and patient satisfaction **surveys** should automatically be generated once a patient is discharged from the subacute care program. One...

...referrals are coming only from one section of the community, as indicted by the zip **codes** , the subacute care **provider** can revamp its marketing strategies.

To be cost-effective, subacute care providers need to be...

14/6,K/7   (Item 7 from file: 15)
DIALOG(R)File 15:(c) 2003 ProQuest Info&Learning. All rts. reserv.

00746086 93-95307
                    USE FORMAT 9 FOR FULL TEXT
Medicare hospital outpatient services and costs: Implications for prospective payment
Winter 1992   LENGTH: 15 Pages
WORD COUNT: 8119

...TEXT: the next step was to link claims with their appropriate hospitals on the basis of **provider identification** . Hospital data were obtained from four files: the Medicare Hospital Cost Report Information System (HCRIS), the Provider Specific file, the American Hospital Association (AHA) 1987 Annual **Survey** file, and the HCFA wage-index file. This linkage allows us to identify hospital claims...

14/6,K/8   (Item 1 from file: 16)
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

09128394   Supplier Number: 79540901 (USE FORMAT 7 FOR FULLTEXT)
AirClic to Power LScan Technologies' Bar Code-Based, Pharmaceutical Applications.
Oct 30, 2001
Word Count: 753

...   Inc., a wireless solutions provider serving the mobile information market, and LScan Technologies, a leading **provider** of bar **code** scanning applications for the pharmaceutical industry, today announced the licensing of AirClic's platform through...

...connect directly to Web sites to obtain specific product information, access coupons, or participate in **surveys** , promotional events and communities.
        The first LScan application based on the AirClic platform is called ...

14/6,K/9   (Item 2 from file: 16)
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

08413329   Supplier Number: 71410400 (USE FORMAT 7 FOR FULLTEXT)
Strength in numbers; Employed physicians enlist unions for bargaining clout.
Feb 26, 2001
Word Count: 2032

...   a third party messenger to get better language, greater enforceability and better reimbursement rates in **provider** agreements. By conducting **surveys** , **identifying** the highest and lowest rates in a region and sharing that fee information (the payers...

14/6,K/10 **(Item 3 from file: 16)**
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

06925584   Supplier Number: 58491617   (USE FORMAT 7 FOR FULLTEXT)
`Critical access' revives rural hospitals.
Jan 3, 2000
Word Count: 1146

...   develop an information and education plan, file state and federal
applications, undergo state inspections and **surveys** , and change its
federal **provider   identification** number.
     Completing the process could cost a hospital hundreds of hours in
work and thousands...

14/6,K/11 **(Item 4 from file: 16)**
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

06107748   Supplier Number: 53690873   (USE FORMAT 7 FOR FULLTEXT)
Targeting female affluence.
Feb, 1999
Word Count: 1083

     (USE FORMAT 7 FOR FULLTEXT)
TEXT:
...in the US, concludes She Said: A Study of Affluent Women and Personal
Finances. The **survey** was conducted by Deloitte & Touche's management
consulting division in conjunction with Capital Rose, a...

...women aged 25 to 65 with personal annual incomes of $100,000 or more,
the **survey** also finds that brand plays a key role for those firms wanting
to break into the sector. Nearly 80 percent of those **surveyed** say they
prefer to do business with a known brand or name, while 65 percent...

...such as the Super Bowl, women will feel they are not the primary target.
The **survey** also identifies a number of 'areas of open opportunity', where
no financial provider is currently...

...as the main 'bread-winner', for example. When asked about
characteristics they look for in **identifying** a financial services
provider , women focus on four key areas: The quality of advice and
education provided. They are...

...January 1997 figures. Affluent women say they enjoy investing their
wealth but half of those **surveyed** "believe they are not taken as
seriously as men in their dealings with financial providers...hours per
month on average handling financial matters that do not include bill
payment, the **survey** found. A total 87 percent of respondents consider
themselves either very or somewhat involved in...

14/6,K/12 **(Item 5 from file: 16)**
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

05465843   Supplier Number: 48284360   (USE FORMAT 7 FOR FULLTEXT)
Advance Paradigm, Inc. Announces Acquisition of Innovative Medical Research
**   Inc.**
Feb 9, 1998
Word Count: 806

     IMR, has developed leading-edge systems to conduct clinical trials and
survey research for the pharmaceutical and managed care industries. IMR's

survey capabilities for biomedical and epidemiological studies are both innovative and proprietary and have important applications...

...substantially broaden IMR's capability in surveying and trials recruitment through enhanced case finding and **provider** **identification** .
     "The acquisition of IMR will allow Advance Paradigm to significantly enhance our Health Benefit Management...

14/6,K/13   (Item 6 from file: 16)
DIALOG(R)File 16:(c) 2003 The Gale Group. All rts. reserv.

03708255   Supplier Number: 45252119 (USE FORMAT 7 FOR FULLTEXT)
74% of dependent plans cover elder care
Jan 9, 1995
Word Count: 456

...   that contributions remaining in the account at year end are forfeited.
     Other reasons that the **surveyed** companies cited for why employees do not participate in dependent care flexible spending accounts include...

...to their account in advance, 59%; employees are unable or unwilling to give the care **provider** 's name, address and tax **identification** number, 54%; and the federal dependent care tax credit is more desirable, 39%.
     Other findings...

14/6,K/14   (Item 1 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

11304987   SUPPLIER NUMBER: 55610153   (USE FORMAT 7 OR 9 FOR FULL TEXT)
Differences between generalists and mental health specialists in the
  psychiatric treatment of Medicare beneficiaries.(Psychiatric Utilization)
August, 1999
WORD COUNT: 7839   LINE COUNT: 00656

...   METHODS
     Data
     The study is based on 1991-1993 data from the Medicare Current Beneficiary **Survey** (MCBS), a national **survey** of Medicare patients sponsored by the Health Care Financing Administration. We linked the **survey** data to all inpatient, outpatient, and physician/supplier claims incurred by the patients and to...

...the Area Resources File and the American Psychological Association. Physician/supplier claims with procedure or **provider** specialty **codes** indicating ambulance, durable medical equipment, x-ray, or laboratory services were excluded from the analysis...

14/6,K/15   (Item 2 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

11243358   SUPPLIER NUMBER: 55367455   (USE FORMAT 7 OR 9 FOR FULL TEXT)
Assessing health plans from an IS perspective.(information system)
July, 1999
WORD COUNT: 2863   LINE COUNT: 00235

...   to know which physicians are doing what in order to identify best providers."
     Besides an **identifier** for each doctor, **provider** profiling demands a clinical data system that links to other databases, extracts information, analyzes and...

...providers who participated in the 1998 HIMSS (Healthcare Information and Management Systems Society)/Hewlett-Packard **survey** were implementing or planning to implement a computer-based patient record or clinical data repository. And more than half of the recently **surveyed** members of the College of Healthcare Information Management Executives were at a similar stage with...

14/6,K/16   (Item 3 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

10770585   SUPPLIER NUMBER: 53643845   (USE FORMAT 7 OR 9 FOR FULL TEXT)
**The effect of hospital volume on the in-hospital complications rate in knee
  replacement patients.**
Dec, 1998
WORD COUNT: 7672   LINE COUNT: 00634

...   was impossible to measure the surgeon volume instead of the hospital volume because the medical **provider   identification** number in our data does not identify a unique surgeon. Some surgeons have multiple Medicare...

...codes through medical record review. However, the knee replacement codes were validated through either patient **survey** or medical record abstract for a random sample of 1,750 persons in the claims...

14/6,K/17   (Item 4 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

09319897   SUPPLIER NUMBER: 19016998   (USE FORMAT 7 OR 9 FOR FULL TEXT)
**What have HMOs learned from clinical prevention services? An examination of
  the experience at Group Health Cooperative of Puget Sound.**
Winter, 1996
WORD COUNT: 13258   LINE COUNT: 01121

...   on our experience, GHC has singled out the following interventions for increasing practitioner predisposing factors:
      * **Identification** of barriers through **provider   surveys** and focus groups (Basch 1987; Ward, Bertrand, and Brown 1991)
      * Participation of clinical leaders in...

14/6,K/18   (Item 5 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

07856592   SUPPLIER NUMBER: 16907970   (USE FORMAT 7 OR 9 FOR FULL TEXT)
**Primary and secondary prevention services in clinical practice: twenty
  years' experience in development, implementation, and evaluation.**
April 12, 1995
WORD COUNT: 5812   LINE COUNT: 00578

...   physicians, nurses, physician assistants, nurse practitioners, pharmacists, medical assistants, and receptionists). Interventions directed to increasing **provider** predisposing factors include **identification** of barriers through **provider   surveys** and focus groups[37]; participation of clinical leaders in program development and implementation[30,38...

14/6,K/19   (Item 6 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

06505746   SUPPLIER NUMBER: 14320575   (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Do community-based, long-term-care services reduce nursing home use? A
  transition probability analysis. (includes appendix)**
Spring, 1993
WORD COUNT: 9091   LINE COUNT: 00775

...   personal and medical characteristics at six-month intervals. CBLTC
service use information is drawn from **surveys** administered at the start,
at the sixth month, and at the twelfth month of the demonstration. The
survey instrument uses retrospective questioning that required
participants to describe the service performed during each provider...

...community residence. Using uniform definitions developed from analysis
of service specifications, the NLTCD demonstration evaluator **coded** each
provider visit as involving services from a nurse, home-health aide,
personal-care aide, housekeeper or...

...the questioning, we assume that service hours reported at the time of
the six-month **survey** are representative of the actual weekly hours
received in months one through six. Similarly, information reported at the
twelve-month **survey** is imputed to months 7-12.
       Because CBLTC service measures are available only at six...

 14/6,K/20   (Item 7 from file: 148)
DIALOG(R)File 148:(c)2003 The Gale Group. All rts. reserv.

03914349   SUPPLIER NUMBER: 07595867   (USE FORMAT 7 OR 9 FOR FULL TEXT)
**HCFA's public-use files: a wealth of data. (Health Care Financing
  Administration) (column)**
May 5, 1989
WORD COUNT: 815   LINE COUNT: 00065

...   There are six to seven Medicare cost report-related tapes. In
addition, the HCFA wage **survey** file with data from 1982 and 1984 is
available. It contains raw data (wages, hours...

...used to develop the area wage index. Providers can request their
wage-related data. . Institutional **provider identification** and
certification. These files are generated by the provider-certification arm
of HCFA. They list...

 14/6,K/21   (Item 1 from file: 160)
DIALOG(R)File 160:(c) 1999 The Gale Group. All rts. reserv.

00939763
The market for integrated voice/data equipment may grow to $2.
May, 1983

   3billion by 1985 according to a Telecommunicaions **survey** in which
manufacturers described technical features of their PBX equipment, gave
marketing techniques, and made...

... user segment. The overall market for 1983 is expected to be $250
million, 25 percent **service - provider** and 75 percent end-user. **Codec**
/filter manufacturers predict that the largest market for single-chip
codec/fibers by 1988 will...

 14/6,K/22   (Item 1 from file: 9)
DIALOG(R)File   9:(c) 2003 Resp. DB Svcs. All rts. reserv.

2678844 Supplier Number: 02678844   (USE FORMAT 7 OR 9 FOR FULLTEXT)
'Critical access' revives rural hospitals

January 03, 2000
WORD COUNT: 1144

    (USE FORMAT 7 OR 9 FOR FULLTEXT)

TEXT:
...develop an information and education plan, file state and federal
applications, undergo state inspections and **surveys** , and change its
federal **provider**   **identification** number.

Completing the process could cost a hospital hundreds of hours in work and
thousands...

14/6,K/23   **(Item 1 from file: 20)**
DIALOG(R)File 20:(c) 2003 The Dialog Corp. All rts. reserv.

13330425 (USE FORMAT 7 OR 9 FOR FULLTEXT)
**Symbol Technologies to Use New Warehouse Management System Powered By
   E-Stamp's E-Warehouse Technology**
October 17, 2000
WORD COUNT: 965

    (USE FORMAT 7 OR 9 FOR FULLTEXT)

...   specific software such as RF Warehouse 2000 into total solutions.
From project management and site **surveys** to software design, complete
installation, service, maintenance and rental solutions, Barcode Systems
Inc. has the...

14/6,K/24   **(Item 1 from file: 610)**
DIALOG(R)File 610:(c) 2003 Business Wire. All rts. reserv.

00611438 20011030303B4235 (USE FORMAT 7 FOR FULLTEXT)
**AirClic to Power LScan Technologies' Bar Code-Based, Pharmaceutical
Applications-Bar Code Technology Gauges Customer Interest, Measures
Effectiveness of Marketing Initiatives**
Tuesday, October 30, 2001 08:05 EST
WORD COUNT: 702

TEXT:
...Inc., a wireless solutions provider serving the mobile information
market, and LScan Technologies, a leading **provider** of bar **code** scanning
applications for the pharmaceutical industry, today announced the licensing
of
AirClic's platform through...

...connect directly to Web sites to obtain specific product
information, access coupons, or participate in **surveys** , promotional
events and
communities.

14/6,K/25   **(Item 1 from file: 636)**
DIALOG(R)File 636:(c) 2003 The Gale Group. All rts. reserv.

02879058   Supplier Number: 45843087 (USE FORMAT 7 FOR FULLTEXT)
Iowa's Network Certification Rules Near Final Form
Oct 6, 1995
Word Count: 345

...   The contract will run through June 30, 2001.
    The data repository will collect patient and **provider**

identification numbers, subsets of data elements from the UB-92 and HCFA 1500 electronic claim forms, outpatient pharmacy claims data, remittance data, consumer health status and satisfaction **surveys** , provider activity records and selected clinical data sets. Information in the repository will be updated...

?

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?show files; ds
File  15:ABI/Inform(R) 1971-2003/Nov 11
         (c) 2003 ProQuest Info&Learning
File  16:Gale Group PROMT(R) 1990-2003/Nov 11
         (c) 2003 The Gale Group
File 148:Gale Group Trade & Industry DB 1976-2003/Nov 12
         (c)2003 The Gale Group
File 160:Gale Group PROMT(R) 1972-1989
         (c) 1999 The Gale Group
File 275:Gale Group Computer DB(TM) 1983-2003/Nov 11
         (c) 2003 The Gale Group
File 621:Gale Group New Prod.Annou.(R) 1985-2003/Nov 12
         (c) 2003 The Gale Group
File   9:Business & Industry(R) Jul/1994-2003/Nov 11
         (c) 2003 Resp. DB Svcs.
File  20:Dialog Global Reporter 1997-2003/Nov 12
         (c) 2003 The Dialog Corp.
File 476:Financial Times Fulltext 1982-2003/Nov 12
         (c) 2003 Financial Times Ltd
File 610:Business Wire 1999-2003/Nov 12
         (c) 2003 Business Wire.
File 613:PR Newswire 1999-2003/Nov 12
         (c) 2003 PR Newswire Association Inc
File 624:McGraw-Hill Publications 1985-2003/Nov 11
         (c) 2003 McGraw-Hill Co. Inc
File 634:San Jose Mercury  Jun 1985-2003/Nov 09
         (c) 2003 San Jose Mercury News
File 636:Gale Group Newsletter DB(TM) 1987-2003/Nov 11
         (c) 2003 The Gale Group
File 810:Business Wire 1986-1999/Feb 28
         (c) 1999 Business Wire
File 813:PR Newswire 1987-1999/Apr 30
         (c) 1999 PR Newswire Association Inc


Set     Items     Description
S1     2246104    SURVEY?? OR ((CONSUMER OR CUSTOMER) (5N) FEEDBACK??)
S2     1551229    IDENTIFIER OR IDENTIFICATION OR IDENTIFYING OR ID
S3      18279     S1 (S) S2
S4      57553     EVALUAT? (5N) DATA
S5      41535     (IDENTIF?) (5N) (PROVIDER?? OR PRODUCER?? OR STORE?? OR RE-
                   STAURANT??)
S6          1     S1 (S) S2 (S) S5 (S) S4
S7       1020     S1 (S) S5
S8         22     S7 AND S4
S9         18     RD (unique items)
S10        15     S9 NOT PY>2001
S11      8543     (IDENTIFIER OR IDENTIFICATION OR IDENTIFYING OR CODED OR P-
                   RE-CODED OR CODE??) (5N) (PROVIDER OR (SERVICE (2W) PROVIDER)
                   OR SALEPERSON)
S12        44     S1 (S) S11
S13        35     RD (unique items)
S14        25     S13 NOT PY>2001
S15         1     S4 AND S14
?save temp
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?
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?save temp
Temp SearchSave "TD054" stored
?show files; ds
File  15:ABI/Inform(R) 1971-2003/Nov 11
         (c) 2003 ProQuest Info&Learning
File  16:Gale Group PROMT(R) 1990-2003/Nov 11
         (c) 2003 The Gale Group
File 148:Gale Group Trade & Industry DB 1976-2003/Nov 12
         (c)2003 The Gale Group
File 160:Gale Group PROMT(R) 1972-1989
         (c) 1999 The Gale Group
File 275:Gale Group Computer DB(TM) 1983-2003/Nov 11
         (c) 2003 The Gale Group
File 621:Gale Group New Prod.Annou.(R) 1985-2003/Nov 12
         (c) 2003 The Gale Group
File   9:Business & Industry(R) Jul/1994-2003/Nov 11
         (c) 2003 Resp. DB Svcs.
File  20:Dialog Global Reporter 1997-2003/Nov 12
         (c) 2003 The Dialog Corp.
File 476:Financial Times Fulltext 1982-2003/Nov 12
         (c) 2003 Financial Times Ltd
File 610:Business Wire 1999-2003/Nov 12
         (c) 2003 Business Wire.
File 613:PR Newswire 1999-2003/Nov 12
         (c) 2003 PR Newswire Association Inc
File 624:McGraw-Hill Publications 1985-2003/Nov 11
         (c) 2003 McGraw-Hill Co. Inc
File 634:San Jose Mercury  Jun 1985-2003/Nov 09
         (c) 2003 San Jose Mercury News
File 636:Gale Group Newsletter DB(TM) 1987-2003/Nov 11
         (c) 2003 The Gale Group
File 810:Business Wire 1986-1999/Feb 28
         (c) 1999 Business Wire
File 813:PR Newswire 1987-1999/Apr 30
         (c) 1999 PR Newswire Association Inc


Set     Items    Description
S1     2246104   SURVEY?? OR ((CONSUMER OR CUSTOMER) (5N) FEEDBACK??)
S2     1551229   IDENTIFIER OR IDENTIFICATION OR IDENTIFYING OR ID
S3       18279   S1 (S) S2
S4       57553   EVALUAT? (5N) DATA
S5       41535   (IDENTIF?) (5N) (PROVIDER?? OR PRODUCER?? OR STORE?? OR RE-
                 STAURANT??)
S6           1   S1 (S) S2 (S) S5 (S) S4
S7        1020   S1 (S) S5
S8          22   S7 AND S4
S9          18   RD (unique items)
S10         15   S9 NOT PY>2001
?
```

PGPUB-DOCUMENT-NUMBER: 20030061141

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20030061141 A1

TITLE: Anonymous respondent method for evaluating business performance

PUBLICATION-DATE: March 27, 2003

INVENTOR-INFORMATION:
NAME   CITY   STATE   COUNTRY RULE-47
D'Alessandro, Alex F.   Clearwater   FL   US

APPL-NO: 10/ 289099

DATE FILED: November 6, 2002

RELATED-US-APPL-DATA:

  child 10289099 A1 20021106

  parent continuation-of 09223426 19981230 US PENDING ✓ 6,556,974

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/36

US-CL-CURRENT: 705/36

REFERENCE-FIGURES: 1

ABSTRACT:

A system for providing accurate, quantifiable and reproducible assessments of
an organization's performance based on predetermined criteria. The system
includes a telecommunications infrastructure administered by a survey
administrator. Employees or non-employees of a company or other organization
to be evaluated log on to the system and answer a plurality of questions
relating to various aspects of the business entity's operations. The
information may be obtained through Internet communications or through
touch-tone telephone systems. The data is stored in a database and
subsequently analyzed by the survey administrator for evaluation and
forecasting of the business entity's performance.

---------- KWIC ---------

Abstract Paragraph - ABTX (1):
  A system for providing accurate, quantifiable and reproducible assessments

g of the business entity's performance.

Summary of Invention Paragraph - BSTX (3):
  [0002] The present invention relates generally to a survey system and apparatus for evaluating the results. More particularly, it relates to a remotely accessible system for the collection of employee or non-employee survey responses to quantify various criteria relating to the operation of an organization.

Summary of Invention Paragraph - BSTX (9):
  [0008] Previous attempts have been made to provide business-related surveys such as described in U.S. Pat. No. 5,551,880 to Bonnstetter et al. (the '880 patent) which is incorporated herein by reference. The '880 patent describes a system for predicting the potential success of an individual for a particular job or task. A survey is conducted wherein the employee or potential employee submits information on behavioral and value preferences. The information is then analyzed and compared against standards for behavior and values previously resolved for specific employment. In a preferred embodiment of the '880 patent, the behavior and value questions are administered through software and evaluated via a predetermined algorithm. However, the system analyzes the individual employee and not the business entity as a whole. Nor does the '880 patent describe an independent party to administer the survey to ensure confidentially, honesty, and a full disclosure of the employee's perceptions of the business entity.

Summary of Invention Paragraph - BSTX (10):
  [0009] Therefore, there is a need in the art for a method and apparatus to provide a reliable self-assessment survey process that can be easily administered and scored with the accuracy and completeness of a well developed written narrative self-assessment.

Summary of Invention Paragraph - BSTX (11):
  [0010] There is a further need in the art to integrate existing telecommunication technologies to avoid the time and labor intensive ordeal of the paper and pencil process or other traditional means of survey administration. This would allow the database of both individual responses and cumulative data to be completely external to the organization being assessed.

Summary of Invention Paragraph - BSTX (12):
  [0011] There is a further need in the art to provide confidentiality to organizations and their employees participating in the survey. This provides a distinct opportunity to benchmark the data to industry peers and to provide the objective assurance that all data is accurate and verifiable by a reliable survey administrator organization.

Summary of Invention Paragraph - BSTX (15):
  [0013] The present invention solves significant problems in the art by providing a telecommunications infrastructure that supports the efficient,

PGPUB-DOCUMENT-NUMBER: 20030171976

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20030171976 A1

TITLE: Method and system for assessing customer experience
                performance

PUBLICATION-DATE: September 11, 2003

INVENTOR-INFORMATION:

NAME	CITY	STATE	COUNTRY	RULE-47
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Benton, Ronald C.	Camas	WA	US	
Davis, Lynda D.	Boise	ID	US	
Horenstein, Robert A.	San Jose	CA	US	
Rideout, Thomas B.	Snohomish	WA	US	

APPL-NO: 10/ 094034

DATE FILED: March 7, 2002

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/10

US-CL-CURRENT: 705/10

REFERENCE-FIGURES: 2

ABSTRACT:

A method for assessing performance of a customer experience of an organization.
Survey data from at least one survey is compiled, wherein the survey is
comprised of questions corresponding to a core competency and wherein the
questions are divided into question groups such that each question group
corresponds to one of a plurality of customer experience management
capabilities. The survey data is analyzed wherein at least one of the customer
experience management capabilities is analyzed according to a corresponding
maturity level.

---------- KWIC ---------

Abstract Paragraph - ABTX (1):
   A method for assessing performance of a customer experience of an
organization. Survey data from at least one survey is compiled, wherein the
survey is comprised of questions corresponding to a core competency and wherein
the questions are divided into question groups such that each question group
corresponds to one of a plurality of customer experience management

PGPUB-DOCUMENT-NUMBER: 20020103693

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20020103693 A1

TITLE: System and method for aggregating and analyzing feedback

PUBLICATION-DATE: August 1, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	COUNTRY	RULE-47
Bayer, Horst	Sunnyvale	CA	US	
Gierich, Sebastian	Buchenbach	CA	DE	
Kasten, Holger	Sunnyvale	NJ	US	
Meyer, Stephan	Westfield		US	

APPL-NO: 09/ 773021

DATE FILED: January 30, 2001   1/2001

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/10, 705/7

US-CL-CURRENT: 705/10, 705/7

REFERENCE-FIGURES: 1

ABSTRACT:

A system and method for aggregating and analyzing feedback operates by receiving a first set of travel information including information identifying a traveler, an itinerary of the traveler, and at least one travel service provider scheduled to provide services to the traveler. The system automatically generates a feedback request based on the first set of travel information and requests specific feedback regarding the at least one travel service provider. The feedback request is transmitted to the traveler for completion, and the system receives the feedback information from the traveler. The system then operates to analyze the feedback information received from the traveler.

---------- KWIC ---------

Summary of Invention Paragraph - BSTX (3):
   [0002] The present invention relates generally to customer service systems and more particularly, to a method for aggregating and analyzing customer feedback.

PGPUB-DOCUMENT-NUMBER: 20020138338

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20020138338 A1

TITLE: Customer complaint alert system and method

PUBLICATION-DATE: September 26, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	COUNTRY	RULE-47
Trauth, Gregory L.	Covington	KY	US	
Brown, Clinton D.	Crestview Hills	KY	US	
Argo, Daniel S.	Taylor Mill	KY	US	

APPL-NO: 09/ 998941

DATE FILED: November 15, 2001   11(200/   ;

RELATED-US-APPL-DATA:

 non-provisional-of-provisional 60278220 20010323 US

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/10

US-CL-CURRENT: 705/10

REFERENCE-FIGURES: 3

ABSTRACT:

A system and method for notifying customer service personnel of customer
feedback messages. When a feedback message is received from a customer, an
electronic notification message or "alert" message is transmitted to customer
service personnel indicating receipt of the message. The system may record
spoken feedback messages from customers which are stored in audio files.
Customer service personnel may then call into the system to listen to the audio
file. Alternatively, the audio file is attached to the alert message. An
additional embodiment enables records related to received customer feedback
messages to be displayed and tracked using a web site.

---------- KWIC ---------

Abstract Paragraph - ABTX (1):
   A system and method for notifying customer service personnel of customer
feedback messages. When a feedback message is received from a customer, an
electronic notification message or "alert" message is transmitted to customer

PGPUB-DOCUMENT-NUMBER: 20020143626

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20020143626 A1

TITLE: System and method for networked loyalty program

PUBLICATION-DATE: October 3, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	COUNTRY	RULE-47
Voltmer, Theodore S.	Caldwell	NJ	US	
Ariff, Fauziah B.	New York	NY	US	

APPL-NO: 09/ 836213

DATE FILED: April 17, 2001

RELATED-US-APPL-DATA:

 non-provisional-of-provisional 60279817 20010329 US

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/14

US-CL-CURRENT: 705/14

REFERENCE-FIGURES: 1

ABSTRACT:

The present invention provides a system for implementing a loyalty program on a network-wide level. The system associates UPC and SKU data on a network level to reward consumers and/or to analyze the data for a variety of business purposes, such as market segmentation analyses and/or analyses relating to consumer spending behaviors or patterns for example. In accordance with one aspect of the invention, the association of UPC and SKU data by the system facilitates implementation of an incentive or loyalty program by providing a universal rewards currency. This universal rewards currency may be "spent" by participants who have earned rewards and accepted by the other participants in the multi-tiered network created by the system. The network may comprise any number of participants, including consumers, retailers (and any of their employees), manufacturers, third-party providers, and the like. In accordance with another aspect of the invention, the association of UPC and SKU data by the system facilitates data analysis on a network level based upon several factors, including a consumer ID, consumer profile, retailer ID, SKU number, UPC, manufacturer ID, and/or the like. The system may compile any of the above data across multiple entities for the purpose of data analysis, such as analyses which may be employed in strategic planning and marketing for example.

PGPUB-DOCUMENT-NUMBER: 20020184085

PGPUB-FILING-TYPE: new

DOCUMENT-IDENTIFIER: US 20020184085 A1

TITLE: Employee performance monitoring system

PUBLICATION-DATE: December 5, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	COUNTRY	RULE-47
Lindia, Stephen A.	Stamford	CT	US	
Morfe, Simeon	Summit	NJ	US	

APPL-NO: 09/ 870865

DATE FILED: May 31, 2001

INT-CL: [07], G06F017/60

US-CL-PUBLISHED: 705/11

US-CL-CURRENT: 705/11

REFERENCE-FIGURES: 2

ABSTRACT:

A fully automated 360.degree. employee review system that is suitable for
corporate intranet or Web-based Internet applications. The system enables
multi-perspective employee data collection from various sources such as an
employee's superiors, peers, subordinates, clients and the employee himself.
The system also permits a participant to select persons whose employment
performance the employee desires to review but is not obligated to review. The
system requires a managerial approval or denial both the reviewers an employee
may select to review his or her performance and the reviewees the reviewer
chooses to review. The system also permits managers or mentors to receive
interim employee performance feedback and generate interim employee action
plans between annual performance evaluations. In addition, the system permits
a user to download the application and participate in the system's employee
performance surveys while offline and disconnected from the corporate intranet
or the World Wide Web.

---------- KWIC ---------

Abstract Paragraph - ABTX (1):
   A fully automated 360.degree. employee review system that is suitable for
corporate intranet or Web-based Internet applications. The system enables
multi-perspective employee data collection from various sources such as an

Abstract Paragraph - ABTX (1):

A fully automated 360.degree. employee review system that is suitable for corporate intranet or Web-based Internet applications. The system enables multi-perspective employee data collection from various sources such as an employee's superiors, peers, subordinates, clients and the employee himself. The system also permits a participant to select persons whose employment performance the employee desires to review but is not obligated to review. The system requires a managerial approval or denial both the reviewers an employee may select to review his or her performance and the reviewees the reviewer chooses to review. The system also permits managers or mentors to receive interim employee performance feedback and generate interim employee action plans between annual performance evaluations. In addition, the system permits a user to download the application and participate in the system's employee performance surveys while offline and disconnected from the corporate intranet or the World Wide Web.

Title - TTL (1):

Employee performance monitoring system

Summary of Invention Paragraph - BSTX (2):

[0001] The present invention relates in general to systems for monitoring employee performance and, in particular, to a 360.degree. system for monitoring employee performance that is network-based and which reduces evaluation bias and corruption and increases compliance with the employee performance evaluation program by both reviewers and reviewees participating in the system.

Summary of Invention Paragraph - BSTX (4):

[0002] Systems and methods for monitoring employee performance in the workplace are well known and widely practiced. Perhaps the oldest and simplest example is a unilateral and largely subjective review of an employee by one or more of his or her superiors. A more objective system is a so-called 360.degree. employee performance review system. A 360.degree. employee review system is a multi-perspective data collection process that can apply to both developmental feedback and performance review feedback data collection. Multi-perspective data collection may be defined as assessments collected from various sources such as one's superiors, peers, subordinates, clients and an individuals own perspective on his or her skills, accomplishments and other job-related behavior and activities. Although not limited thereto, 360.degree. employee review systems are particularly well-suited to evaluation of service sector employees heavily involved in client/customer interaction such as financial advisors, brokers, bankers, lawyers, and so on. A 360.degree. employee review system is considered to be more accurate and less biased than simple review of an employee by one or more managers.

Summary of Invention Paragraph - BSTX (5):

[0003] Until recently, however, conventional 360.degree. employee reviews were conducted as paper-based review processes or as hybrid paper-electronic processes. For instance, a typical 360.degree. employee review data